### Chapter 8 / Troubleshooting SAS® Mobile BI

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Getting Started

Welcome

Getting Started
How Do I Use the App?
Check out the new features.
View the videos: SAS Mobile BI for iPad and iPhone playlist on YouTube
Use VoiceOver? Learn the specialized accessibility actions for the app.

Common Tasks
View Reports
"Add a Server Connection"
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What Else Can I Do?
Tasks available while adding a report
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Managing subscribed reports
Managing favorite reports
Managing recent reports
Managing a collection of reports

Troubleshooting
“Troubleshooting SAS® Mobile BI”
“Getting Help”

What’s New

SAS Mobile BI 8.21 provides the following updates:

- Enhanced accessibility support.
  
  SAS Mobile BI now provides sonification for charts. Using SAS Graphics Accelerator technology, sonification provides non-speech audio to convey important information about a chart. Sonification can be useful to users with visual or cognitive disabilities. For more information, see “Sonification” and “Data Element Actions” in SAS Mobile BI for iPad and iPhone: Accessibility Features.

- Support for Face ID.

- Enhancements and fixes.

What Is SAS® Mobile BI?

Use SAS Mobile BI to view and share charts and reports on Apple, Android, and Windows devices. For device support information, see the SAS Mobile BI page in the appropriate location:

- Apple iTunes store
- Google Play
- Microsoft Windows store

With SAS Mobile BI you can do the following tasks:

- download charts and reports from your organization servers
- view charts and reports in standard or expanded mode
- view and make comments about charts and reports

SAS Mobile BI supports viewing reports even when your device is offline. See “What Is an Offline Report?”

You can create these charts and reports using SAS® Visual Analytics.
How Do I Use the App?

1. Contact your SAS administrator for the following information:
   - the user ID and password to use
   - the server to use for the server connection
   - the port to specify for the server connection
   - whether the server is a secure connection
   - any instructions that your organization might have for using SAS Mobile BI

   **TIP** Sometimes an organization does not require security credentials. If your SAS administrator says you do not need a user ID, then you are accessing the server as a guest.

2. You can now add a connection to the server.

   **TIP** If you are accessing the server as a guest, be sure to select Log in as guest when you add the server connection.

3. After you add a server connection, you can add reports to your subscriptions.

4. After you have subscribed to a report, tap that report to open it.

   **TIP**
   - The report viewer provides many features, including the ability to annotate a screen capture and share your screen with others. To learn more, see “Viewing Reports” and “Sharing Reports”.
   - Depending on how a report is designed, a report can provide the same functionality that you use in SAS® Visual Analytics. To learn more, see “Navigating Report Features”.
   - Use the sample reports to see what you can do with the SAS Mobile BI app. See “About Sample Reports”.

Where Did the Portfolio and Library Go?

If you have used prior versions of SAS Mobile BI, you are familiar with the app’s portfolio and library. Starting in release 8.1, the app uses new names for these locations.

The portfolio is now called subscriptions views. Here, you can select from the following views:

- **Subscriptions**
- **Recent**
- **Favorites**
- Any collections that are available for you. Each collection is its own view.

You can select a different view from the **Subscriptions** list.
The library is now called Add Reports. Open this window to add reports to your Subscriptions view. You can add and manage server connections in this location, too.

What Does That Symbol Mean?

The app uses symbols to quickly communicate states and other information.

- ✅ indicates that you have subscribed to the report.
- ✅ indicates that you have selected a report. See “Selecting Multiple Reports”.
- ⭐ indicates that the report is a favorite. See “Identifying Your Favorite Reports”.
- ● indicates that the report is new or has been updated since you last viewed it.
- ○ indicates that an error has occurred and the report is currently unavailable.
- ⛔ indicates a secure server connection in the All Connections list.
- ⛅ indicates that the report uses remote data. See “About Local and Remote Report Data”.

Where Is the Help?

If you have located the SAS Mobile BI Help by using an internet search, know that you can also open the Help while in the app.

In the Subscriptions, Recent, Favorites, or collections views:
- Tap 🔄 and then tap Help.

In Add Reports:
- Tap 🔄 and then tap Help.

In the report viewer:
- Tap ⋮ and then tap Help.

The Help opens in your web browser. If your device supports a multitasking view, you can view the app and Help at the same time.

To return to SAS Mobile BI, tap SAS BI in the upper left corner.
What Is an Offline Report?

On a mobile device, when SAS Mobile BI cannot connect to the server, any report that you view on that device is offline. Typically, this is because the device does not have a network connection, but it can also be because of security measures that prevent access to an internal network or server. Because SAS Mobile BI cannot communicate with the server, certain app functionality is modified.

Depending on how a report is designed, an offline report might continue to work as designed or some of its functionality might adjust to offline mode.

For detailed information about offline functionality and settings that administrators can use to adjust offline support, see the documentation on the SAS Mobile BI Product web page.

Note: Offline reports are not the same as reports that use remote data for security purposes. You might see this feature called tethering or live connection. It refers to a security setting that requires that your device maintain a connection to the server in order to view data in a report. For more information, see “About Local and Remote Report Data”.
Connecting to Servers

What Is a Server Connection?

An organization has one or more servers that contain SAS® Visual Analytics reports. Most servers require that you provide security credentials before you can connect to them and access reports. In SAS Mobile BI, a server connection is saved information that includes the server address and your security credentials for a server. If your organization has more than one server, you can add connections to additional servers in the same way.

Note: Contact your network administrator about your organization’s requirements for mobile devices to access the network.

Contact your SAS Visual Analytics administrator for your user ID, password, and server information.

Your administrator can also tell you the following:

- If the server provides a guest connection. See “What Is a Guest Connection?”
If the server requires a passcode. See "What Are Passcodes?"

**TIP** When you first open the SAS Mobile BI app, a connection to the SAS Demo Server might be present. See "About Sample Reports".

**What Is a Guest Connection?**

A *guest connection* does not require security credentials. A guest connection allows you to download reports that an organization makes available to the public.

Note: The Guest connection feature is not supported by servers running SAS Visual Analytics 8.1. The feature is supported on all other releases of SAS Visual Analytics.

Typically, guest connections do not support the following features:

- the Recent view
- comments
- alert subscriptions

If the Favorites view and Favorites setting are supported with guest connections, functionality is limited:

- When a report is viewed by way of a guest connection, no user can add that report to favorites.
- The favorites shown for the guest connection are shared by all users of that connection.
- You cannot remove these favorites.

**Quickly Add a Server Connection**

To help a colleague quickly and easily add a server connection, email a report to them. You can email a report from SAS Visual Analytics or from SAS Mobile BI.

Here is how it works:

1. Email a report to a colleague. The email contains a link to the report.
   
   See “Sending Reports to Others”.

2. The recipient taps the link in the email. When the SAS Mobile BI app is installed on the recipient’s device, the link opens the app.

3. If the recipient does not have a connection to the required server, the app asks whether it should add the server connection to the **Connections** list.

   The recipient taps **Yes**.

4. If the server supports guest mode, the app asks the recipient if they want to log on as a guest. If the recipient taps **No**, the app requests the user's user ID and password. If the recipient taps **Yes**, the app goes to the next step.

   **TIP** If your server connection also requires Esri credentials, enter your user ID and password for Esri services. To learn more, see "What Are Geographic Mapping Services?"

5. The app asks whether the recipient wants to open the report. The recipient taps **Yes**.

   The app subscribes to the report and downloads it.

6. The recipient can tap the report to view it.
If the new connection is to a passcode-protected server, the app requires the recipient to create a passcode.

**Add a Server Connection**

The following slideshow introduces how to add a server connection. A detailed procedure follows the slideshow. View the slideshow in SAS Help Center.

**Note:**

Each organization’s network is unique. If you cannot access the SAS Visual Analytics server from your mobile device, contact the following people:

- your network administrator. Ask about your organization’s requirements that enable mobile devices to access the network.
- your SAS administrator. Ask whether your mobile device should be added to a whitelist. See “About the Whitelist”.

Complete these steps:

1. If you are not in Subscriptions, tap the list at the top of the screen and select Subscriptions.
2. Tap Add in the options bar at the top of the app.
3. Tap Add in the All Connections list.
   
   **TIP** The All Connections list is the left-most list in the window.
   - If the list is not on the screen, tap All Connections in the navigation bar.
   - If the navigation path is too long to fit on the screen, drag right to scroll.
4. In the Server field, enter the address of the new server.
5. In the Port field, enter the port number for the new server.
   
   **TIP** A typical port number is 80.
6. Tap the Secure connection switch if the server requires a secure connection (SSL).
   
   **TIP** indicates a secure server connection in the All Connections list.
7. Tap Next to verify the connection.
   
   **TIP** If the connection fails, a message is displayed to help you correct the problem.
8. If the server provides guest access, the Log on as guest switch appears. If you want to access the server without providing credentials, tap this switch and skip the next step.
   
   **TIP** You might have to scroll the page up to view all of the fields.
9. If a server requires security credentials to access reports:
   - In the User ID field, enter your user ID.
   - In the Password field, enter your password.
10 (Optional) In the **Description** field, customize the description for the new connection.

**Note:** If you delete the default description, you must enter a new description. The field cannot be left blank.

11 Tap **Next** to verify your access to the server.

**Note:** If the verification fails, a message is displayed to help you correct the problem.

**TIP** If your server connection also allows you to enable Esri premium services, you can do so at this point. If Esri credentials are required, you are prompted to enter your user ID and password for Esri services. To learn more, see “What Are Geographic Mapping Services?”

12 Tap **Done**.

The connection is saved and the Add Connection window closes. Information about available reports is automatically downloaded and appears in Add Reports.

If the new connection is to a passcode-protected server, the app requires you to create a passcode.

### Change the Password for a Server Connection

Complete these steps in Add Reports:

1 Tap **All Connections** in the navigation path.

**TIP** If **All Connections** is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap **Edit**.

**TIP** (Phone) To locate **Edit**, drag right to the **All Connections** pane.

4 Tap the **Password** field and enter the new password.

5 Tap **Done** to save the update.

### Change the Description for a Server Connection

Complete these steps in Add Reports:

1 Tap **All Connections** in the navigation path.

**TIP** If **All Connections** is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap **Edit**.

**TIP** (Phone) To locate **Edit**, drag right to the **All Connections** pane.

4 Tap the **Description** field and enter the new description. The field cannot be blank.
Note: You might have to scroll the page up to view all of this field.

5 Tap Done to save the update.

**Turn On Esri Premium Services**

To turn on Esri premium services, you must edit the connection to a server that has Esri premium services. Complete these steps in Add Reports:

1 Tap All Connections in the navigation path.

   **TIP** If All Connections is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap Edit.

   **TIP** (Phone) To locate Edit, drag right to the All Connections pane.

4 Tap Esri Premium Services.

5 Tap the Enable Esri Premium Services switch.
   It turns green when on.
   If the app does not request your Esri credentials, the Esri services are turned on at this point. Tap <<, tap Done, and skip the remaining steps.
   **Note:** This switch appears only if the Esri premium services capability is enabled for your user ID on the server. To enable the capability, contact your SAS Visual Analytics administrator.

6 If the app requests your Esri credentials, enter your user ID and password for the Esri premium services. These credentials might be different from those used for the server connection.

7 Tap Done.

**Turn Off Esri Premium Services**

To turn off Esri premium services, you must edit the connection to a server that has Esri premium services. Complete these steps in Add Reports:

1 Tap All Connections in the navigation path.

   **TIP** If All Connections is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap Edit.

   **TIP** (Phone) To locate Edit, drag right to the All Connections pane.

4 Tap Esri Premium Services.
5 Tap the Enable Esri Premium Services switch. It turns white when off.

6 Tap ↩.

7 Tap Done.

Remove a Server Connection

When you remove a server connection, any report subscriptions from the affected server are removed from your device.

Complete these steps in Add Reports:

1 Tap All Connections in the navigation path.

   TIP If All Connections is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

2 Tap the server connection that you want to edit.

3 Tap Edit.

   TIP (Phone) To locate Edit, drag right to the All Connections pane.

4 Scroll to the bottom and tap Remove Connection.

5 Tap Remove.

About Sample Reports

The SAS® Mobile BI app provides many sample reports for you. When you first open the SAS Mobile BI app, some sample reports are available in Subscriptions. By viewing these sample reports, you can explore the features that SAS Visual Analytics reports can provide on your device. Additional sample reports are located on the SAS Demo Server. You must have internet access to download samples from this server.

Note:

- The SAS Demo Server provides a guest connection. Reports located on a guest connection do not support all of the app’s features, such as the comments feature. For more information, see “What Is a Guest Connection?”

- You can remove sample reports from Subscriptions. You can always subscribe to sample reports from the SAS Demo Server again. See “Subscribe to a Report”.

- You can remove the SAS Demo Server connection. See “Remove a Server Connection”.

- You can always reconnect to the SAS Demo Server. See “Restore Sample Reports”.
Securing Reports and Data

Locking the App with a Passcode

What Are Passcodes?
The SAS® Mobile BI app provides a passcode feature that locks the app. There are two types of passcodes:

required passcode
A required passcode is a passcode that is required by a server connection. When you connect to the affected server, it requires that you create a passcode. An organization uses a required passcode to secure its reports.

You create or enter a required passcode at these times:
- when you connect to a passcode-secured server for the first time
  
  Note: The first time the Passcode window appears, you can close the window without creating a passcode. However, when you attempt to subscribe to a report from the affected server, a passcode is required at that time.
- when you are connected to a secure server and the app has been inactive for a length of time
  
  Note: When you create a required passcode but later remove the server connection that required the passcode, the passcode continues to lock the app. However, the passcode is now optional. You can remove an optional passcode.

optional passcode
An optional passcode is a passcode that you choose to use to lock the app. The first time the Passcode window appears, you can close the window without creating a passcode. However, when you attempt to subscribe to a report, you must enter a passcode at that time. You can remove the passcode at any time.

You enter an optional passcode at these times:
- when you create the passcode
- when the app has been inactive for 5 minutes

How the Passcode Locks the App
Both required and optional passcodes lock the app. They differ in the time length and how many passcode attempts you are permitted.

required passcode
- When the app is inactive for 15 minutes, locks the app. The system administrator of the affected server can change this value.
- Permits a specific number of attempts. The system administrator of the affected server can change this value.
- When you exceed the number of attempts, locks the app for 15 minutes.

optional passcode
- When the app is inactive for 5 minutes, locks the app.
- Permits 10 attempts.
- When you exceed the number of attempts, locks the app for 15 minutes.
With either passcode type, you can enter your passcode again after the lock-out expires.

If you then exceed the allowed number of passcode attempts a second time, the app removes all SAS BI reports, data, and server connections from your device. The app is reset to its default settings.

If you forget your passcode, you must delete and re-install the app on your device.

How Passcode Works with Touch ID and Face ID
Several models of Apple iPhone and iPad provide Touch ID or Face ID. You can use these features to lock your device. You can set up these features in the iOS Settings app. For more information, see documentation for the version of iOS running on your device.

Note: iOS also provides a Passcode feature. SAS Mobile BI uses its own passcode, not the iOS passcode.

The passcode for SAS Mobile BI locks only the SAS Mobile BI app. When the app requires you to use a passcode, you must create a passcode. Then, if Touch ID or Face ID is already set up, the app displays Touch ID or Face ID to unlock the app. You can cancel either of those options and enter the app passcode instead.

Create a Required Passcode
When you create a connection to a passcode-secured server, you must create a passcode.

After you save the connection, the Create Passcode window appears.

1. Enter a four-digit passcode that you can remember.
   The Verify Passcode window appears.

2. Enter your passcode a second time.
   If your first and second try do not match, the app displays a message and you can enter the passcode again.

When the passcode that you entered is verified, the passcode is saved.

If you tap Cancel and do not create a passcode, you can still navigate the reports on the server. However, if you attempt to subscribe to a report, the app requires that you create a passcode first.

Create an Optional Passcode
Complete these steps:

1. In the Subscriptions view, tap .

2. Tap the Passcode switch. It changes to blue.
   The Create Passcode window appears.

3. Enter a four-digit passcode that you can remember.
   The Verify Passcode window appears.

4. Enter your passcode a second time.
   If your first and second try do not match, the app displays a message and you can enter the passcode again.

When the passcode that you entered is verified, the passcode is saved.

Change a Passcode
Complete these steps:

1. In the Subscriptions view, tap .

2 Tap Change Passcode.
   The Enter Passcode window appears.

3 Enter your current passcode.
   The Create Passcode window appears.

4 Enter a new four-digit passcode.

5 To verify the passcode, enter the new passcode a second time.

When the passcode that you entered is verified, the passcode is saved.
Tap Cancel if you do not want to change your passcode.

Remove an Optional Passcode

Complete these steps:

1 In the Subscriptions view, tap 🗝️.

2 Tap the Passcode switch.
   The Enter Passcode window appears.

3 Enter your current passcode to verify your identity and remove the passcode.
   The Passcode switch turns white.

You can create an optional passcode at any time. See “Create an Optional Passcode”.

About Local and Remote Report Data

What Is Local and Remote Report Data?

When you subscribe to a report, it appears in Subscriptions. However, depending on the security assigned to your user ID, the report data might not exist on your device. Report data can be local or remote:

- **Local** data is stored on your device.
- **Remote** data exists on your device only while the report is open and the device is connected to a Wi-Fi or cellular network.

How Do I Know a Report Uses Remote Data?

If a report uses remote data, the report tile in Subscriptions displays the cloud icon: 🌐.

If a report uses local data, this icon does not appear on the tile.

Why Do Reports Use Remote Data?

Your organization requires that these reports have extra security.

Your SAS administrator sets this option for the user ID that you use to access the server. When this option is set, all reports on that server use remote data.

If you have any questions about this option, contact the SAS administrator for the affected server.
How Does Remote Data Work?

Each time you open a report with remote data, the app connects to the server. The Prepare Data notification is displayed while the data is downloaded. The report opens when the data is available on the device. The data is available only while you view the report.

After you close the report, the data is removed from the device. The image no longer appears on the report tile in Subscriptions. If you are not connected to a network and you try to open the report, it does not open.

About the Whitelist

The SAS® Mobile BI app provides a whitelist feature that an organization can use to secure its servers. If your device ID is not on the whitelist, you cannot access the server.

When you connect to a secure server for the first time, a whitelist message appears if your device ID is not on the whitelist. A subsequent message provides the option to email an access request to your SAS administrator. The email contains information that your administrator requires to give you access to the server.

Note: You must know the email address of your administrator in order to send the email.

Limiting Data Use on Your Device

About Data Use

If your device provides 3G or 4G support and you have a cellular data subscription, you might want SAS® Mobile BI to use only Wi-Fi networks to download reports. Limiting the app’s use of 3G and 4G networks reduces your data use. When cellular data is turned off for the app, make sure that you are connected to a Wi-Fi network. The app requires a network for many tasks, such as the following:

- navigating reports on a server, subscribing and downloading reports
- using interactive features in reports, such as data drilling and filtering
- commenting

For more information, see “What Is an Offline Report?” For information about additional cellular data settings, see the User’s Guide for your device.

By default, this setting is turned on.

Turn Off the Cellular Data Setting

To turn off the cellular data setting:

1. In the Subscriptions view, tap 📜.
2. Tap Advanced Settings.
3. Tap the Cellular Data switch. It changes to white.
4. To return to SAS Mobile BI, tap SAS BI in the upper left corner.
**Turn On the Cellular Data Setting**

To turn on the cellular data setting:

1. In the Subscriptions view, tap 📲.
2. Tap **Advanced Settings**.
3. Tap the **Cellular Data** switch. It changes to green.
4. To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.

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**Restoring App Settings**

**Restore the Default Settings**

Restoring the default settings removes all reports and server connections and resets all settings.

To restore the default settings:

1. In the Subscriptions view, tap 📲.
2. Tap **Advanced Settings**.
3. Tap the **Restore Default Settings** switch. It changes to green.
4. To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.

**Restore Sample Reports**

If you removed the connection to the SAS Demo Server, you cannot access sample reports. To access sample reports again, restore the connection to the SAS Demo Server:

1. In the Subscriptions view, tap 📲.
2. Tap **Advanced Settings**.
3. Tap the **Restore Sample Reports** switch. It changes to green.
4. To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.
Adding and Updating Reports

Adding Reports

Open Add Reports

To open Add Reports:

1. If you are in the report viewer, tap \( \leftarrow \) to exit.

2. If you are not in Subscriptions, tap the list at the top of the screen and select Subscriptions.

3. Tap Add in the options bar at the top of the app.

Locate a Report on a Server Connection

Complete these steps in Add Reports:

1. Tap a server connection.

   **TIP** Indicates a secure server connection in the All Connections list.

2. Tap a folder to view its contents.

Updating Reports

Updating Reports Automatically

Updating Reports on Demand

Update a Closed Report

Update the Report You Are Viewing

Responding to Notifications

Respond to a Report Notification

Respond to a Collection Notification

Disable and Enable SAS Mobile BI Notifications

Personalize How Notifications Appear

What Is a Subscription?

Subscribe to a Report

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Respond to a Report Notification

Respond to a Collection Notification

Disable and Enable SAS Mobile BI Notifications

Personalize How Notifications Appear
Drag your finger left and right in the navigation bar to view your path. Tap any part of the path to view that folder.

Tap All Connections to view the list of servers again.

To drill up, tap the folder name in the navigation path. The selected folder’s list scrolls onto the screen if it is not already displayed.

**What Is a Subscription?**

A *subscription* is how you identify reports on a server connection that you want to view. When you subscribe to a report, it is downloaded to your device and added to Subscriptions.

To subscribe to a report, you must be assigned the appropriate roles and capabilities in SAS® Visual Analytics. Contact your SAS Visual Analytics administrator about these assignments.

**Subscribe to a Report**

The following slideshow introduces how to subscribe to a report. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

Complete these steps in Add Reports:

1. Navigate to the report.
2. Tap the report to view its Details window.
3. Tap to add the report to Subscriptions.

You can also subscribe to multiple reports at one time. See “Selecting Multiple Reports”.

**Updating Reports Automatically**

When a subscribed report is updated on the server, SAS® Mobile BI automatically updates that report on your device.

The app must be active to check for updates. These checks occur at the following times:

- when you start or re-activate the app
- every 15 minutes after the app opens

Note: The app cannot control how the device prioritizes the updates.

Note:

- If you have turned off the Cellular Data setting, subscriptions report are updated only when a Wi-Fi network is available.
- Automatic update does not apply to reports that use remote data.
Updating Reports on Demand

You can update a report to make sure you have the latest changes and data.

Update a Closed Report

To update a report on demand:

1. In the subscription views, press and hold on the report tile.
2. Tap

Update the Report You Are Viewing

Complete these steps in an open report:

1. Tap ...
2. Tap Update.
   - If the report has no updates, a message is displayed.
     Note: A message is not displayed for remote-data reports.
   - If there are updates, the report is downloaded.

Responding to Notifications

What Are Notifications?

Notifications provide alerts and other information about apps on your device.

SAS Mobile BI generates notifications when the following changes occur while you are not using the app:

- One or more reports have been updated or are new on your device.
- One or more reports have been added to or removed from a collection. You must subscribe to a collection to receive its notifications.

You can view and respond to these notifications in the Notification Center. For more information about notifications, see the User’s Guide for the version of iOS running on your device.

Respond to a Report Notification

When a report is updated or new, a notification is generated. You can respond to notifications in the Notification Center.

Updated Report Notifications

In the Notification Center, you can respond in the following ways:

- Tap the notification to open the affected report in SAS Mobile BI.
Flick left on the notification and tap **Clear State**. The **Updated** state will not appear on the affected report tile in the **Subscriptions** view.

Flick left on the notification and tap **x** to clear the notification.

**New Report Notifications**

Notifications for new reports typically occur when you subscribe to a large report and then close the app before the report completes downloading.

In the Notification Center, you can respond in the following ways:

- Tap the notification to open the affected report in SAS Mobile BI.
- Flick left on the notification and tap **Clear State**.
  
  The **New** state will not appear on the affected report tile in the **Subscriptions** view.
- Flick left on the notification and tap **x** to clear the notification.

**Respond to a Collection Notification**

When a report is added to or removed from a collection, a notification is generated. If multiple reports are added or removed, a notification is generated for each affected report. You can respond to notifications in the Notification Center. See “**View Collections**”.

**Addition Notifications**

In the Notification Center, you can respond in the following ways:

- Tap the notification to open the report in SAS Mobile BI.
- Flick left on the notification and tap **x** to clear the notification.

**Removal Notifications**

In the Notification Center, you can respond in the following ways:

- Tap the notification to open the SAS Mobile BI app.
- Flick left on the notification and tap **x** to clear the notification.

**Disable and Enable SAS Mobile BI Notifications**

You can control whether you receive notifications from SAS Mobile BI. Notifications are enabled by default.

**Disable Notifications**

To disable notifications:

1. In the Subscriptions view, tap **Advance Settings**.
2. Tap **Notifications**.
3. Tap **Allow Notifications** to clear the setting.
4. It changes to white.
5 To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.

**Enable Notifications**

To enable notifications:

1 In the Subscriptions view, tap [ ].
2 Tap **Advanced Settings**.
3 Tap **Notifications**.
4 Tap **Allow Notifications** to clear the setting.
   It changes to green.
5 To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.

**Personalize How Notifications Appear**

You can personalize where the notifications appear on your device.

1 In the Subscriptions view, tap [ ].
2 Tap **Advanced Settings**.
3 Tap **Notifications**.
4 Tap **Show in Notification Center** if you want the notifications to appear in the Notification Center. The switch turns green.
5 Tap **Sounds** if you want to hear a sound when a notification occurs. The switch turns green.
6 Tap **Badge App Icon** if you want badge notifications to appear on the SAS Mobile BI app icon. The switch turns green.
7 Tap **Show on Lock Screen** if you want the notifications to appear on the screen when the device is locked. The switch turns green.
8 You can also personalize how alerts appear when your device is unlocked.
   Tap **None**, **Banner**, or **Alerts**.
9 To return to SAS Mobile BI, tap **SAS BI** in the upper left corner.
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Viewing Current Subscriptions

What Are Subscriptions?
Subscriptions help you manage which reports are available to view on your device. Subscriptions also enable the app to update reports with recent changes. All of the reports that you view are subscribed from a server connection. See “What Is a Server Connection?”

View Your Subscriptions
The Subscriptions view is the default view in the app. It shows all of the reports that you subscribe to on this mobile device.
If you are in Add Reports or the report viewer, tap \( \text{<} \) to return to the Subscriptions view.
If you are in another subscriptions view, tap the list at the top of the screen and tap Subscriptions.
Your subscriptions are grouped:
- **My Subscriptions** shows the reports to which you have subscribed on this device.
  
  **Note:** Typically, subscribed reports are downloaded to your device. However, some reports might require additional security and use remote data instead. See “About Local and Remote Report Data”.
- **Samples** shows any sample reports to which you have subscribed on this device. See “About Sample Reports”.

Identifying Your Favorite Reports

Your Favorites on Every Device
In the app, the Favorites view shows the reports that you have marked as favorites. Your favorites are tracked by the server on which the reports are located. When you add a report to your favorites, the server adds that report to your favorites on any other devices that you use to view reports, including SAS® Visual Analytics on your desktop system. The same is true when you remove a report from your favorites. However, your favorites are not shown on every device automatically. On each device you must first define the server connection to the server on which your favorite reports are located.

**Note:** If none of your server connections support the favorites setting, the Favorites view does not appear in the app.

View Your Favorites
In the list at the top of the screen, tap **Favorites**.
Favorites can contain one or more folders (also called groups). Tap a folder to display its reports. Folders can contain folders, too. Tap on the breadcrumb path to return to the previous level.
Add a Report to Favorites
You can add reports to your favorites while a report is open in the report viewer, or when a closed report appears in the following views: Subscriptions, Recent, collections, search results, or Add Reports.

Add an Open Report to Favorites
Complete these steps in the report viewer:
1. Tap .
2. Tap ⭐.

Add a Closed Report to Favorites
To add a closed report to your favorites:
1. Press and hold on the report tile.
2. Tap ⭐.
In Add Reports, tap the report tile and tap ⭐.
You can also add multiple reports at one time. See “Selecting Multiple Reports”.

Remove a Report from Favorites
You can remove reports from your favorites while a report is open in the report viewer, or when a closed report appears in the following views: Subscriptions, Favorites, Recent, collections, search results, or Add Reports.

Remove an Open Report from Favorites
Complete these steps in the report viewer:
1. Tap .
2. Tap ⭐.

Remove a Closed Report from Favorites
To remove a closed report from your favorites:
1. Press and hold on the report tile.
2. Tap ⭐.
In Add Reports, tap the report tile and tap ⭐.
You can also remove multiple reports at one time. See “Selecting Multiple Reports”. 
Tracking Recent Reports

The Recent view contains reports that you have recently viewed on one of your devices.

Recent Reports on Every Device

The Recent view shows the reports that you have recently viewed on one or more of your devices. Recent reports appear in the app only after you have specified the connection to the applicable server. The history of your recent report access is maintained by the server on which the report is located. Your history is shared with all of the devices that you use to view reports from that server, including SAS® Visual Analytics on your desktop system.

You can clear the history of report access, which clears the Recent view. Doing so clears the history on the selected server connection and on the device. If you have viewed reports from multiple server connections, you must clear the history for each server connection. See “Clear the Recent View”.

Note: If none of your server connections maintain a history of your recently viewed reports, the Recent view does not appear in the app.

View Your Recent Reports

In the list at the top of the screen, tap Recent.

Clear the Recent View

To clear the Recent view:

1  In the list at the top of the screen, tap Subscriptions.
2  Tap Add.
3  To view your connections, tap All Connections in the navigation path.

   **TIP** If All Connections is not displayed because the navigation path is too long to fit on the screen, drag right to scroll the path.

4  Tap the server connection for which you want to clear the history.
5  Tap Edit. The connection opens.
6  Scroll to the bottom and tap Clear Recent Reports for Connection.

   **TIP** The button changes to the disabled state when the history has been cleared. If this button is disabled before you tap it, then there are no recent reports to clear.
View Collections

What Is a Collection?

A collection shows a group of reports that a collection owner has selected and made available to users. Each collection is a selection in the Subscriptions list.

A collection can also contain one or more folders (also called groups). Each folder can contain one or more reports or be empty. The reports contained in the folder are favorites that belong to the collection owner. By adding the folder to the collection, the owner has chosen to make the reports available to other users.

What Is Auto-Subscription?

Auto-subscription is a feature that automatically subscribes to reports that are members of a collection. Auto-subscription works in the following ways:

- If you have not subscribed to any reports in the collection, selecting auto-subscribe adds all of the reports to your subscriptions.
- If you have already subscribed to some of the reports in the collection, selecting auto-subscribe adds the unsubscribed reports to your subscriptions.
- If you have selected auto-subscribe and new reports are added to the collection, the new reports are automatically added to your subscriptions.
- If you have selected auto-subscribe and reports that you did not manually subscribe to are removed from the collection, those reports are automatically removed from your subscriptions.

When you remove auto-subscribe, you no longer have a subscription to the reports in the collection.

Note: If you subscribed to some of the reports in the collection before selecting auto-subscribe, you still subscribe to those reports.

View a Collection

In the Subscriptions view, tap the list at the top of the screen and tap the name of a collection. The collection opens to display its reports.

A collection can contain one or more folders (also called groups). Tap a folder to display its reports. Folders can contain folders, too. Tap on the breadcrumb path to return to the previous level.

Auto-subscribe to a Collection

To learn how auto-subscription works, see “What Is Auto-Subscription?”

In the collection, tap RSVP.

The button toggles to indicate the change: RSVP.

Remove Auto-subscribe

To learn how auto-subscription works, see “What Is Auto-Subscription?”

In the collection, tap RSVP.
Locate Details about a Report

Identify a Report’s Server and Path Information

Overview
The following slideshow introduces how to find a report’s server and path information. Detailed procedures follow the slideshow.

View the slideshow in SAS Help Center.

Identify an Open Report’s Server and Path Information
Complete these steps in an open report:

1  Tap .

2  Tap Details to expand the section.

Identify a Closed Report’s Server and Path Information
Complete these steps in the subscription views:

1  Press and hold on the report tile.

2  Tap Details.

In the Add Reports window, tap a report tile to view its details.

Determine When a Report Was Updated

Determine When an Open Report Was Updated
Complete these steps in an open report:

1  Tap .

2  Tap Details to expand the section.

Determine When a Closed Report Was Updated
1  Press and hold on the report tile.

2  Tap Details.

In the Add Reports window, tap a report tile to view its details.
View the Table of Contents for a Report

You cannot preview a report’s table of contents in the Add Reports window. For reports that use remote data ( ), the table of contents is not available until you open the report and the data is downloaded. See “About Local and Remote Report Data”.

View the Table of Contents for an Open Report

Complete these steps in an open report:

1. Tap .
2. Scroll down to view the tiles in the Pages section.
3. Tap a page tile to go to that page.

View the Table of Contents for a Closed Report

Complete these steps:

1. Press and hold on the report tile.
2. Tap Details.
3. Scroll down to view the tiles in the Pages section.

TIP Tap a page tile to open the report to that page.

Note: You cannot preview a report’s table of contents in the Add Reports window. For reports that use remote data ( ), the table of contents is not available until you open the report and the data is downloaded. See “About Local and Remote Report Data”.

Identify a Report’s Author

Identify an Open Report’s Author

In an open report, tap . The author’s name is shown beneath the report title.

Identify a Closed Report’s Author

In the subscription views, press and hold on the report tile. The author’s name is shown beneath the report title. In the Add Reports window, tap a report tile to view its details.

Unsubscribe from a Report

To unsubscribe from a report:
1 Press and hold on the report tile.
2 Tap Unsubscribe.
3 Tap Unsubscribe in the confirmation window.

You can also unsubscribe from multiple reports at one time. See “Selecting Multiple Reports”.

### Searching with Spotlight

#### What Is Spotlight?

Spotify is the search feature integrated into the iOS operating system on your device.

#### Search with Spotlight

Complete these steps to search for the app, your server connections, or your report subscriptions:

1 On the Home screen, swipe down from the middle of the screen.
2 Tap the Search field.
3 Enter a keyword or phrase. Matching results appear as you type.
4 Tap a search result to open it.

### Searching Reports

The search feature is located in Add Reports. See “Open Add Reports”.

#### How Search Works

#### What Can I Search?

You can search reports that are located in your subscriptions and on all of your connected servers. Both locations are searched at the same time. The search is not case sensitive.

**TIP** If you do not have a network connection, search is disabled.

During a search, the following content is reviewed for the search string:
- the report name
- report descriptions
- keywords
- the report source file

Because the report source file is also searched, some reports can appear in the search results because of a data set or report object that is used in the report. For example, if a report uses a data set called Cars, that report will be in the search results for “cars.” If a report contains a bar chart, that report will be in the search results “bar chart.”
Can I Narrow My Search?
You can narrow your search by using quotation marks ("), the plus sign (+) and minus sign (–) operators.

- To specify some or all of a report title, enclose the title in quotation marks—for example, “accessibility in SAS Mobile BI”. The search is not case sensitive.
- To require a term, prepend the term with the plus sign—for example, +sample.
- To exclude a term, prepend the term with the minus sign—for example, –sample.

You can also append a wildcard (*) operator to single- and multiple-word searches. For example, if you search for the word "sample," then it is converted to sample*. You get different results than if you entered "sample", +sample, or *sample*.

How Many Results Can I Receive?
You can receive up to 100 results for each connection that you include in your search. The search results can also include an unlimited number of results from the subscribed reports in your Subscriptions view.

Search Reports
Complete these steps from Add Reports:

1. Tap in the command bar. The Search field appears.
2. Tap the Search for reports field. The keyboard appears.
3. Enter all or part of a search string.

   **TIP** To narrow the search, use search operators.

4. Tap Search on the keyboard. The reports that include the search string appear in a results list. The results list is categorized by the location of the reports.
   - You can filter the results.
   - You can sort the results.

5. (Optional) To subscribe to a report in the search results, tap that report, and then tap .
6. If you already subscribe to the report, you can open it. Tap the report and then tap Open.
7. To clear the search results, tap in the search field.
8. To dismiss search, tap Cancel.

Filter Search Results
To filter search results:

1. Tap Filter in the upper right corner.
2. Select one or more filter options:
the location, such as subscriptions or the server connection
the report author’s name
Note: This option is available only after the search is completed.
the date on which the report was last updated on the server

3 (Tablet) Your selections are applied as you make them.
(Phone) Tap Done.

---

**Sorting Reports**

You can sort reports wherever you see the Sort list.

**Sort Reports**

To sort reports, tap the Sort list and make a selection.

Note: Available sort selections vary depending on the view.

**Name**
sorts the reports by name and then by the date of the last successful update of the report on the server.

**Connection**
sorts the reports by their associated server connection, then by their name, and then by the date of the last successful update of the report on the server.

**Subscription Date**
sorts the reports by the date of their subscription and then by their name.

**Last Updated**
sorts the reports by the date of their last successful update of the report on the server, and then by their name.

**Most Recently Viewed**
In the Subscriptions view, this selection sorts the reports by the date of their last access on this device and then by their name.
In the Recent view, this selection sorts the reports by their associated connection, then by the most recently viewed date across all devices.

**Sort Search Results**

You can sort search results. To learn about search, see “Searching Reports”.

To sort the results, tap the Sort list and make a selection:

**Name**
sorts the reports by name and then by the last successful update of the report on the server.

**Last Updated**
sorts the reports by the date of their last successful update of the report on the server, and then by their name.

**Relevance**
sorts the reports by relevance that is determined by the associated server connection.
Selecting Multiple Reports

You can use Selection mode to work with multiple reports at one time. Selection mode is available wherever you see the Select button. Depending on the location in the app, you can use Selection mode to subscribe, unsubscribe, share, email, copy, or add or remove reports from Favorites.

Select Multiple Reports in Subscriptions, Recent, Favorites, and Collection Views

Complete these steps in any of the views:

1. Tap Select.
2. Tap one or more reports.
   - 🔄 indicates that a report is selected.
3. Tap Actions.
4. Tap the action that you want to complete.
5. If you decide not to act on the reports, tap Cancel to dismiss Selection mode.

Select Multiple Reports in Add Reports

In order to work with multiple reports at once while in Add Reports, the reports must all be located in the same folder.

1. Navigate to the folder that contains the reports.
2. Tap Select.
3. Tap 📅 next to each report that you want to select.
   - 🔄 indicates that a report is selected. Tap this button again if you want to clear the selection.

   **TIP** Tap ☰ in the options bar and then tap Subscribe to All Reports to select all of the reports in the folder.

4. Tap the action that you want to complete.
5. If you decide not to act on the reports, tap Cancel to dismiss Selection mode.
Viewing Reports

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Viewing Reports and Report Objects

Open a Report

Open a Report from the Subscriptions View
Tap any report tile.

Open a Report from the Recent, Favorites, or Collection Views
To view a report:
1 Tap the report tile to open the Details window.
2 If SAS Mobile BI has a subscription to the report, tap Open.
   Otherwise, tap + to download the report.
3 When the report is available, tap Open.
Page through a Report

Reports can include more than one page.
You can flick left or right on the device screen to view the pages in sequence.
To see and select from all the pages:

1. Tap ‣.
2. Scroll up to view all of the pages.
3. Tap the page that you want to view.
4. To dismiss the view without selecting a page, tap Done.

View a Report Object Using the Full Screen

To maximize a report object:

1. Tap the object to highlight it.
2. Tap ↑ to maximize the object to use the full screen.
3. Tap ↓ to restore the object size.

Overriding Report Themes

What Is a Theme?

A report is designed to use specific colors and fonts. These are called a theme. You can override that theme when you view the report in SAS Mobile BI.
The following alternative themes are available:
- High Contrast
- Light (Marine)

Override the Theme

To override the theme:

1. In the Subscriptions view, tap 📣.
2. Tap Advanced Settings.
3. Tap Override Report Theme. A list of themes opens.
4. Tap the theme that you want to use.
5. Tap < .
6. To return to SAS Mobile BI, tap SAS BI in the upper left corner.
Learning More about a Report Object

What Information Is Available about Report Objects?

Each page of a report can contain one or more report objects.

The Information view displays the following information about the report and report objects. However, the information shown varies depending on how the report is designed. See your report designer for more information.

- a description of the object
- legend information, if applicable
- display rules, if applicable
- filters, if applicable
- rank, if applicable
- alerts, if applicable

Note: The Alerts feature is not supported by servers running SAS® Visual Analytics 8.1. The feature is supported by all other releases.

- the Comments feature

View Information about a Report Object

Note: The Information view displays information about the selected object. If you select a link that takes you to a hidden page, the Information view is refreshed to provide detailed information about the report objects that are on the hidden page or about the hidden page itself.

Complete these steps in the report viewer:

1. Tap an object to highlight it.
2. Tap to open the Information view.
   See "What Information Is Available about Report Objects?"
3. For easier viewing, each section can expand and collapse.
   Tap a section heading to toggle the section.
4. (Tablets only) To view information about another report object on the page, tap that object.
   The Information view shows the information for the highlighted object.

   **TIP** To view information about the report as a whole, tap at the top of the view.

5. (Tablet) Tap to close the Information view.
   (Phone) Tap **Done**.
Receiving Alerts about Data Criteria

What Is an Alert?

An alert specifies criteria to monitor. When data in the report meets the criteria, an email or text message is sent to users that have subscribed to the alert. A report can have one or more alerts settings.

When you view the report in the SAS® Mobile BI app, you can view the alerts that are set for that report. You can also see whether you are subscribed to an alert. If you are subscribed to an alert, when the alert criteria is met an email is sent to you.

Note:
- Alert criteria and subscriptions are set using SAS® Visual Analytics. For more information, see SAS Visual Analytics documentation.
- The Alerts feature is not supported for reports located on servers running SAS Visual Analytics 8.1. It is supported by all other releases.

View Alert Subscriptions

Complete these steps in the report viewer:

1. Tap ‡ to open the Information view.
2. Tap Alerts.
   TIP You might have to scroll down to locate the button.
3. Alerts are grouped by report object. Scroll the Alerts view to view all alerts.
4. Tap ‡ to return to the Information view.

Subscribe to an Alert

Complete these steps in the report viewer:

1. Tap ‡ to open the Information view.
2. Tap Alerts.
3. Scroll to the alert and tap the subscription switch to On.
4. Tap ‡ to return to the Information view.

Unsubscribe to an Alert

Complete these steps in the report viewer:

1. Tap ‡ to open the Information view.
Using Best-fit Layout for Reports

What Is Best-Fit Layout?

Best-fit layout is when the app rearranges the layout of report objects in a page for the best fit available. Use this setting to make your reports easier to view regardless of which device you use or how you hold your device. The best-fit layout adapts depending on your device (tablet or phone) and the device orientation (portrait or landscape).

Note:
- Best-fit layout applies to reports located on servers running SAS® Visual Analytics 7.4 and earlier.
- Best-fit layout should not be used with some report features. Contact your report designer to learn if you should turn off best-fit layout.

The setting affects the layout of all reports.
- On a phone, the default setting is on.
- On a tablet, the default setting is off.

You can change the setting while viewing a report or in the app settings.

Rearrange the Layout of Report Objects

Complete these steps while viewing a report:
1. Tap ...
2. Tap Rearrange Layout.

This setting toggles between two states:
- Layout for limited space on smaller devices. The report objects are laid out vertically. Scroll down to view all report objects in a page.
  
  Note: If the device screen is large enough, the app will not change the layout.
- Layout for larger devices. The report objects are laid out as designed by the report designer.

Turn On Best-fit Layout

To turn on this setting:
1. In the Subscriptions view, tap
2. Tap Advanced Settings.
3. Tap the Best-fit Layout switch.
The switch turns green.

4 To return to SAS Mobile BI, tap SAS BI in the upper left corner.

**Turn Off Best-fit Layout**

To turn off this setting:

1 In the Subscriptions view, tap 📊.

2 Tap Advanced Settings.

3 Tap the Best-fit Layout switch.
   
   The switch turns white.

4 To return to SAS Mobile BI, tap SAS BI in the upper left corner.
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Viewing Data

View Data Details
Report objects can display details about a data point.
To view the data details, tap on a location in a report object.
A context menu appears. If data details are available, they are displayed in the menu by default.

View Data in Explore Mode
Use Explore mode to explore underlying data while viewing a report object.
Complete these steps:
1 Tap ☐ to view the object in full-screen mode.
2 Tap ☐ to open Explore mode.
   TIP You can still tap the report object when the table is open.
3 Tap a row in the table to highlight the associated data in the object.
   TIP You can scroll the table up and down to view all of the rows.
4 Tap ☐ to close Explore mode.

Sort Column Data in Tables
By default, table columns support sorting. You can sort the values in an individual column. You can also set up primary and secondary sorts. If no columns sort, see Columns Do Not Sort in a Table.
To sort data in a column, tap the column heading.
A window appears with these options:
Ascending
  sorts the data from low value to high value (A to Z or from 0 to 9).
Descending
  sorts the data from high value to low value (Z to A or from 9 to 0).
Advanced
  displays secondary sorting options that you can apply to additional columns.
  For each additional column that you want to sort, tap the column heading, tap Advanced, and then tap Secondary. Tap Ascending or Descending. Tap Apply.
  Note: After you apply a secondary sort, creating or modifying the primary sort clears all previously applied secondary sorts.
Reset
  returns the data to its original sort order.
Sort Data in Charts and Graphs

Charts and graphs have a predefined sort order that is determined by the report author. In charts and graphs in which the report author has turned on X- and Y-axis labels, you can change the default sort order of either the X axis or Y axis or both.

To change the default sort order for a single measure (X axis, Y axis, or both) in a chart or graph:

1. Tap and hold the X-axis label and tap one of the following options:
   - **Ascending**
     sorts the data from low value to high value (A to Z or from 0 to 9).
   - **Descending**
     sorts the data from high value to low value (Z to A or from 9 to 0).
   - **Reset**
     returns the data to its original sort order.

2. Tap and hold the Y-axis label. Tap **Ascending**, **Descending**, or **Reset**.

When multiple measures exist on a single axis, you can choose the measure upon which to sort.

For example, assume that the X-axis label presents two measures, one for **East Coast** and one for **West Coast**. In this case, tap the X-axis label, and then tap **Measure**. Tap **East Coast** or **West Coast**, and then tap the sort option that you want. Then, tap **Apply**.

View Upper and Lower Range Values for Forecasted Values

For every forecasted value, charts also provide an upper and lower range value.

To view the upper and lower range values:

1. Press and hold your finger on the axis in the chart.
   - A reference line appears. The reference line displays tooltips for the range values that intersect the reference line.

2. Without lifting your finger, move your finger along the axis.
   - The reference line moves and displays the range for other forecasted values.

Report designers might include forecasted values on the following types of charts:

- bar chart
- line chart
- bubble chart
- scatter chart
Filtering Data

About Data Filters, Filter Controls, and Data Highlighting

Data Filters
SAS Mobile BI displays interactive reports. Depending on how a report is designed, you can select areas in a report to dynamically filter data.

**TIP** Be sure to ask your report designer to describe any filter controls that are available in the report and explain how to use them.

Report designers can use the following types of data filters in reports:

Object-level filters
filters data in one or more report objects. A report can include one or more of these filters.

Interactive filters
a report object provides interactive selections that filter one or more other report objects on the same page.

For example, you have a report page that contains two report objects: a pie chart and a bar chart. When you tap a slice in the pie chart, the value of that slice filters the data in the bar chart.

A report can include one or more of these filters.

Report-level filters
filters data in the report as a whole. A report can include one or more of these filters.

Page-level filters
filters data in the page as a whole. A report can include one or more of these filters.

Page-link filters
a link that opens another page in a report. Depending on the selection made in the source page, the link filters all of the report objects in the target page. On the source page, page-link filters are located in a report object’s context menu. On the target page, the applied filter value is located in the filter control bar.

Report-link filters
a link that opens another report. Depending on the selection made in the source report, the link filters all of the report objects in the target report. In the source report, report-link filters are located in a report object’s context menu. In the target report, the applied filter value is located in the filter control bar.

Incoming filters
filters data by one or more values that are passed in from another report or report object. For example, when chart A interacts with chart B, the value selected in chart A is the incoming filter for chart B.

See also “Filter Controls” and “Filter Control Bars”.

Filter Controls
*Filter controls* provide a way for you to control how data is filtered in a report. For example, if data is filtered by month, a filter control enables you to specify a month. Report designers can select from a variety of controls when they create data filters in reports. Some filter controls are familiar, such as buttons, lists, text fields, check boxes, radio buttons, single sliders, and range sliders. Your report designer might customize the behavior of some of these controls, but the controls all work in a familiar way.
Other filter controls are less obvious, such as parameters, links, interactions, and highlighting. For example, your report designer can specify whether one-way filters appear in the filter control bar. Unless your report designer tells you that specific controls are present, you might not realize they are in the report.

**TIP** Be sure to ask your report designer to describe any filter controls that are available in the report and explain how to use them.

### Filter Control Bars

When a report contains report-level, page-level, or interactive data filters, the filter controls are located on the applicable filter control bar.

**Report-Level Control Bar**

Report-level filters affect data in the report as a whole. The following examples are report-level filters:

- A filter control in the report that filters the report data as a whole.
- A link from a source report that opens a target report and filters its data.

The filters are located in a control bar that is below the report title bar. The filter control bar is anchored to the report title bar so that you can use these filters on any page of the report.

**Page-Level Control Bar**

Page-level filters affect data on the current page only. The following examples are page-level filters:

- A filter control for a page that simultaneously filters all of the report objects on that page.
- A link from one page in the report that opens another page and filters that page’s data.

The filter controls are located in a bar that is across the top of the page.

**Interactive-Filter Control Bar**

Interactive filters affect objects on the current page. This control bar appears across the top of the page. If page-level filters exist, the interactive-filter control bar appears under the page-level control bar.

The interactive-filter control bar displays one-way filters and two-way filters that you select on the current page. One-way and two-way filters behave as follows:

- **One-way filters**: A selection in object A filters all objects on the page. A selection in object B filters all objects on the page, except object A.
- **Two-way filters**: A selection in object A filters all objects on the page. A selection in object B filters all objects on the page, including object A.

### Data Highlighting

Reports can be designed to enable the **highlighting** of data. As with filtering, you select a filter value. However, instead of displaying only the data that is filtered, the affected data is highlighted.

**Note**: Highlighting is also called **brushing** or **linked selection**. Highlighting is not the same as report-link filters or page-link filters.

Depending on how a report object is designed, you can highlight data in the following ways:

- make a selection from a filter control.
- tap a value in a chart or graph.
- tap a value in a table or crosstab.

The data is highlighted in one or more report objects in the report page.
View Values of Interactive Filters

The following slideshow introduces how to use interactive filters to automatically filter data in multiple report objects. Additional information follows the slideshow.

View the slideshow in SAS Help Center.

The interactive filter control bar displays one-way filters and two-way filters that you select on the current page. If no selections are made on the page, No Selections appears next to the Filters label at the beginning of the control bar.

When you select a value in an object that has an interactive filter, a filter control appears in the control bar. The control indicates the selected value. If you select a different value in the filter, the text in the filter control is updated to reflect the new selection.

You can clear one or more filters:
- Tap to clear a filter and remove the control from the control bar.
- Tap Clear All to clear all the filters and to remove their filter controls from the control bar.

Note: If a report object (such as a control prompt) requires a filter, the clear button does not appear in the filter control.

If multiple one-way filters are selected, a separator (✓) appears between their controls on the bar. The separators indicate that the selection in one filter affects the other filters. Separators are not displayed when multiple two-way filters are selected.

Note: If you clear a one-way filter or change the selected value for a one-way filter, subsequent filters on the control bar are cleared. Their filter controls are removed from the control bar. Changing the selected value for a two-way filter or clearing its filter control has no affect on other filter controls on the control bar.

Toggle the Filter Control Bars

The filter control bars toggle:
- You can display the filter control bars to view filter values.
- You can hide the filter control bars so that the report has more screen space.

To toggle the filter control bars:
1. Tap in the report title bar.
2. Tap the available selection: Hide Control Bar or Show Control Bar.

See also “Filter Controls” and “Filter Control Bars”.

View Filters that Run Off the Screen

If the control bar has more filters than it can display (for example, on a phone), the bar scrolls horizontally. Drag left and right to view the filters.

View the Filter Value on a Slider Control

When a report uses a slider control, you can press and hold your finger on the slider bar or the slider indicator to see the filter value.
Animate a Report Object

In animated report objects, the data points are animated across a range of time.

1  Tap the report object.
   The Play button (▶) appears in the lower left corner.

2  Tap ▶ to start the animation.
   A progress indicator for the time range appears briefly.
   □ The value on the left is the current time point in the animation time range.
   □ The value on the right is the final time point in the animation time range.

3  To view different time points in the animation, drag the progress indicator along the time range.

4  Tap || to pause the animation and display the progress indicator.

Linking to Other Data or Information

What Are Links?

If a report object provides links, they are available in that report object’s context menu.

Depending on how a report is designed, report objects can include the following types of links:

Page links
   links from one page in a report to another page in the same report.
   The link can also include a filter value. In the target page, the button is enabled in the report title bar if the link applied a filter value. See “Toggle the Filter Control Bars”.

Report links
   links from one report to another report.
   The link can also include a filter value. In the target page, the button is enabled in the report title bar if the link applied a filter value. See “Toggle the Filter Control Bars”.

External links
   links from the report to an external location, such as a web page.

Hidden page links
   links from a report object to a page that appears only when the link is tapped. A link can be attached to a report object, image, or text. The hidden page opens on top of the current report page. A hidden page can contain one or more report objects. The link can also include a filter value.
   Note: This link type was formerly called Info window.

Link to Another Page or Report

Complete these steps in a report:

1  Tap on a data point in a report object.
2 On the context menu, tap 

The linking options appear.

3 Tap your selection.

The linked location opens.

4 (Optional) If a link applied a filter to the data in the target report or page, you can view the applied filter and its value.

   Tap $ to open the Information view.

   Also, when a link applies a filter, the $ button in the upper left corner is enabled. Tap $ to view the filters that are applied to the data.

**Return to a Prior Link Location**

When you have linked across multiple pages or reports, you can review the trail of your navigation and return to a prior link location.

To go back one step, tap $.

To review the trail of your navigation and select a prior link:

1 Tap and hold $.

2 Tap a selection in the trail to return to that location.

To exit the report viewer and close all reports, tap Close All Reports.

**Link to an External Location**

To link to an external location:

1 Tap on a data point in a report object.

2 On the context menu, tap 

   The linking options appear.

3 Tap the external link.

   The linked location opens in a new window.

4 To return from the external link, tap SAS BI in the upper-left corner.

---

**Drilling Into Data Hierarchies**

**What Is a Hierarchy?**

A hierarchy is an arrangement of category columns that is based on parent-child relationships. The levels of a hierarchy are arranged with more general information at the top and more specific information at the bottom. For example, a hierarchy of date-time columns contains Year as the top level, Month as the next level, and Day as the bottom level.
Hierarchies enable you to drill down in charts, graphs, and crosstabs (also known as crosstabulation tables). A report object can be designed with one or two data hierarchies. For example, an object might have a date-time hierarchy and a geographic hierarchy.

**Ways to Navigate Hierarchies**

If a report object provides data drilling options, they are available in the context menu. In a crosstab, data-drilling options are also provided as links in the table itself.

Depending on how a report object is designed, you can navigate hierarchies in the following ways:

- drill down in a hierarchy to a subset of data and detailed information
- drill up in the hierarchy to a broader data view and general information
- expand or collapse the data hierarchy in a crosstab
- navigate one or two hierarchies

**Navigate a Data Hierarchy**

The following slideshow introduces how to navigate a hierarchy in a chart or graph. Detailed information follows the slideshow.

View the slideshow in SAS Help Center.

To drill down or up:

1. Tap on a data point in a report object.

2. On the context menu, tap 🔺. The context menu displays the data-drilling options.
   
   **Note:** If an object contains two hierarchies, an indicator ( • • ) appears at the bottom of the context menu. Flick left and right in the context menu to alternate between the hierarchies.

3. Tap your selection. The new data view appears in the object.

4. To view another level of the data hierarchy, repeat steps 1 through 3.

   **TIP** To navigate upward in the data hierarchy, tap ⬆️ in the upper left corner of the report object.

5. To view the available selections in a level in one or more hierarchies, or to change a selection:
   

      **Note:** If the report object contains two hierarchies and you have drilled into both, you can view the levels in both hierarchies.

   b. To view another level, tap that level. The report object draws the new data view.

   c. To change the selection for a level, tap ☐ for that level to view a list, and then tap your new selection. The report object draws the new data view.
View Warnings about a Report Object

If you drill down to a level of the report object that does not have data, a warning appears in the lower right corner of the affected object: 🔄.

To view more information about the warning, tap 🔄.

Expanding Crosstab Hierarchies

Why Expand a Crosstab Hierarchy?

You can expand a crosstab hierarchy. Expansion enables you to view multiple levels of data at a time.

For example, in a crosstab that summarizes data for several years, you can expand one or more of the years. The expansion enables you to see the data at the year level and, for the years that you expanded, the data at the month level as well.

Alternatively, you can expand all the children of a hierarchy level. For example, given the same report, you can expand all the years at the same time to review their monthly data.

Note: You can view the rank applied to the crosstab in the Information view.

Expand the Hierarchy in a Crosstab

To expand a single item in a crosstab (for example, to expand the year 2017):

1. Tap the item.
2. On the context menu, tap 🔄.

To expand all of the children for a level in a crosstab (for example, to expand the months for all of the years):

1. Tap a column heading or row heading.
2. On the context menu, tap 🔄.

   The crosstab expands to display the data that is the next level down in the hierarchy.

To collapse a single item in a crosstab (for example, to collapse the year 2017):

1. Tap the item.
2. On the context menu, tap 🔄.

To collapse all of the children for a level in a crosstab (for example, to collapse the months for all of the years):

1. Tap a column heading or row heading.
2. On the context menu, tap 🔄.
Exploring Data By Using Geographic Mapping Services

What Are Geographic Mapping Services?

A report can contain a report object that uses maps as a background for data. SAS Visual Analytics uses maps provided by the Esri and OpenStreetMap geographic mapping services to display data points. SAS Visual Analytics retrieves map tiles and location information from these services and then overlays your organization’s data onto the maps.

Depending on how the report is designed, your data can appear on the map as map coordinates, bubbles plotted onto the map, or regions on the map.

You can use the following options:

Search
Search the map for street addresses or points of interest (for example, pizza restaurants).

Distance
Identify data points on a bubble or coordinate map that are within a specified radial distance from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.

Drive distance
(Premium) Identify data points on the map that are within a specified driving distance from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.

Drive time
(Premium) Identify data points on the map that are within a specified driving time from a selected point. The map zooms in and highlights the affected area. Data points outside of the affected area remain on the map but are not selected.

Remember the following considerations about premium services:

- Premium services are supported only on servers running SAS Visual Analytics 8.1 or later.
- Drive distance and Drive time are premium features provided by Esri. Your organization uses Esri credits to pay for using these features.
- To use these features, you must provide login credentials for the mapping service on at least one of your devices.
- You might need additional capabilities assigned to your user ID. Contact your SAS administrator.
- You can disable and enable the premium services. See “Turn On Esri Premium Services” and “Turn Off Esri Premium Services”.

What Is a Break?

You can select additional distances to highlight on the map. Each distance is identified by a break. You can select additional distances when using the Drive time and Drive distance selections.

For example, you want to identify customers that are within 5 miles and 10 miles of a location. When you select Drive distance, you set the distance for 5 miles. Then, you add a break and select a distance of 10 miles. The mapping service calculates both distances and highlights the affected areas on the map. The area within 5 miles is a shade of gray. The area within 5 to 10 miles is another shade of gray.
View Map Data Details
To view data about a data point, tap that data point in the map. A context menu appears.
Tap to display the data details if the details are not already displayed.

Pan the Map
To view areas of the map that are outside the area of the report object, you can pan the map:
1. To turn on Pan mode, pinch or spread your fingers on the report object to zoom in or out.
   
   **TIP** Zooming the report object alerts the app that your subsequent gestures are not intended to page through the report.

2. Drag a finger on the map to pan the viewable area.

3. Turn off Pan mode. Double-tap the map to restore its initial view.

   **TIP** You can now page through the report again.

Search the Map
You can search for street addresses or points of interest (for example, pizza restaurants). You can receive up to 20 results.

**TIP** If there are more than 20 results, the 20 shown are those nearest the current visual center of the map.

Complete the following steps:
1. Drag your finger on the map to position your chosen location to the visual center of the map.

   **TIP** Search works from the current visual center of the map and continues outward.

2. Tap .

3. Enter your search string in the Search field.

   Depending on what you enter, the Search interface displays up to ten suggestions. Up to five recent search strings for searches that have occurred during the current application session are also displayed. As you continue to type, new suggestions replace earlier ones.

   **TIP** Search works within the current visual bounds of the map. If you want search results outside the current visual bounds, you must drag the map to view the area in which you want to receive new search results and tap again.
To initiate a search using the string that is typed, select or press Enter. Alternatively, you can select any one of the suggested search items or recent search items in the list. The search results appear. A location pin for each result appears on the map. The pin number matches its result. When available, the search results also provide the name and street name of each location.

5 Tap a result in the list or its pin on the map.

6 You can highlight data points surrounding the selected result by selecting a distance option.

Note: For information about premium services, see “What Are Geographic Mapping Services?”

Distance
Specify a distance from the search result location.

Drive time
(Premium) Specify a drive time from the search result location.

Drive distance
(Premium) Specify a driving distance from the search result location.

7 To start a new search, tap in the Search field.

**Identify Data Points by Distance**

The following slideshow introduces how to identify data points by distance. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified distance:

1 Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point, and then tap on the context menu.
   - To select any location on the map, press and hold on that location.

2 Tap Distance on the context menu.

3 Tap Miles or Kilometers to use your preferred measure.

4 Specify the distance by dragging the indicator on the selection bar.

5 Tap Apply.

The app zooms into the map and highlights the data points that are located within the specified distance.

**Identify Data Points by Drive Time**

Note: For information about premium services, see “What Are Geographic Mapping Services?”

The following slideshow introduces how to identify data points by drive time. A detailed procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified drive time:

1 Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point, and then tap on the context menu.
To select any location on the map, press and hold on that location.

2 Tap Drive time on the menu.

3 Specify the drive time by dragging the indicator on the selection bar.

4 (Optional) To identify more than one set of data points, tap Add Break and enter an additional data point.
   See “What Is a Break?”

5 Tap Apply.
   The map highlights the data points that are located within the specified drive time.

### Identify Data Points By Drive Distance

Note: For information about premium services, see “What Are Geographic Mapping Services?”

The following slideshow introduces how to identify data points by drive distance. A step-by-step procedure follows the slideshow.

View the slideshow in SAS Help Center.

To identify data points that are located within a specified drive distance:

1 Select the location to use for the center of distance calculation:
   - To select a data point, tap the data point, and then tap on the context menu.
   - To select any location on the map, press and hold on that location.

2 Tap Drive distance on the menu.

3 Tap Miles or Kilometers to use your preferred measure.

4 Specify the drive distance by dragging the indicator on the selection bar.

5 (Optional) To identify more than one set of data points, tap Add Break and enter an additional data point.
   See “What Is a Break?”

6 Tap Apply.
   The map highlights the data points that are located within the specified drive distance.

### View Map Data in Explore Mode

Use Explore mode to explore underlying data while working with a map.

Complete these steps:

1 Tap to view the map in full-screen mode.
   The Explore mode palette appears in the upper right corner.

2 Tap to open Explore mode.

   **TIP** You can still tap the map when the table is open.

3 Tap a row in the table to see the associated location in the map.
4 Tap \( \text{Hint} \) to close Explore mode.

**Highlight Map Data in Explore Mode**

When in Explore mode, you can select areas on the map and the associated table data is highlighted. Complete these steps:

1 Tap \( \text{Hint} \) to view the map in full-screen mode.
   
The Explore mode palette appears in the upper right corner.

2 Tap \( \text{Hint} \).

3 Tap a selection shape: \( \text{Select Line} \) or \( \text{Select Area} \).
   
   **Note:** The shapes that are available depend on how the report is designed.

4 Tap and drag on the map to select an area of the map.
   
The associated data for this area is highlighted in the table.

5 To highlight other table data, tap inside the selection shape and drag to the new area.
   
The movement is reflected in the table.

6 To dismiss the selection, tap outside the selection shape.

**Select Map Data to Interact with Other Report Objects**

When in Explore mode, you can select areas on the map to identify data for an interaction in other report objects. Because you must view the map in full-screen to use Explore mode, you cannot see the interactions when they occur. You must restore the map to its initial size and review the other report objects for interactions.

**TIP** Ask your report designer if the map has any interactions with other report objects.

Complete these steps:

1 Tap \( \text{Hint} \) to view the map in full-screen mode.
   
The Explore mode palette appears in the upper right corner.

2 Tap \( \text{Hint} \).

3 Tap a selection shape: \( \text{Select Line} \) or \( \text{Select Area} \).
   
   **Note:** The shapes that are available depend on how the report is designed.

4 Tap and drag on the map to select an area of the map.

5 Tap \( \text{Hint} \) to restore the map to its initial size.

   **TIP** Be careful not to tap the map and dismiss the selected area.

6 Review the report objects on this page for interactions based on the data selected.
## Sharing Reports

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Sending Reports to Others

How Can I Send a Report?

The app generates a report link that enables you to send a report. A report link is a link that opens the report. You can send a link by using email or text. You can also use AirDrop or copy and paste a report link into another app.

When a recipient taps the link, the app subscribes to the report, downloads it, and opens it. If the recipient does not have a server connection to the server on which the report is located, the app automatically sets up the connection.

TIP
- Sharing a report is a great way to quickly and easily add a server connection. See “Quickly Add a Server Connection”.
- Depending on how a report is accessed, email can also contain a screen capture of a page from the report.
- You can share a report without subscribing to it.
- You can share multiple reports at once. See “Selecting Multiple Reports”.

Email or Text a Report

To email or text a report:

1. Open the Details window:
   - In the report viewer, tap :.
   - In the subscription views, press and hold on the report tile, and then tap Details.
   - In Add Reports, tap a report.
2. Tap 📧.
3. Tap Mail or Message.
   A window appears with the report information.
4. Tap the To field and enter the contact information for the recipient.
5. (Optional) Tap the message area to enter text.
6. Tap Send.
7. To dismiss the Details window in the report viewer:
   - (Tablet) Tap :.
   - (Phone) Tap Done.
   To dismiss the Details window in the subscription views, tap ↵.
You can also send multiple reports at one time. See “Selecting Multiple Reports”.

AirDrop a Report

Use AirDrop to share a report with another iPad or iPhone user. Typically, AirDrop works within 30 feet.

1. Open the Details window:
   - In the report viewer, tap 📜.
   - In the subscription views, press and hold on the report tile, and then tap Details.
   - In Add Reports, tap a report.
2. Tap ➡️.
3. Tap AirDrop.
4. Tap the AirDrop contacts with whom you want to share.
5. To dismiss the Details window in the report viewer:
   - (Tablet) Tap 📜.
   - (Phone) Tap Done.
   To dismiss the Details window in the subscription views, tap ⬅️.

Copy a Report Link

You can copy a report link without having a subscription to the report:

1. Open the Details window:
   - In the report viewer, tap 📜.
   - In the subscription views, press and hold on the report tile, and then tap Details.
   - In Add Reports, tap a report.
2. Tap ➡️.
3. Tap Copy.
4. To dismiss the Details window in the report viewer:
   - (Tablet) Tap 📜.
   - (Phone) Tap Done.
   To dismiss the Details window in the subscription views, tap ⬅️.

You can also copy multiple report links at one time. See “Selecting Multiple Reports”.

Receive a Report Link

When you receive an email or a text message with a link to a report, tap the link to open the report.
If you already subscribe to the affected report, the SAS® Mobile BI app opens the report.

If you are not subscribed to the report, the app asks whether you want to download the report.

If you choose to download the report, the app asks whether to open the report when the download is complete.

If you have not created a connection to the server hosting the report, the app prompts you to create a connection.

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**Presenting Your Screen to Others**

You can share your device screen with others while you use the SAS Mobile BI app.

**About Present Screen**

You can share your device screen with others while you use the SAS Mobile BI app. Participants invited to the presentation do not require the SAS Mobile BI app. The screen is viewed in a web browser. The web browser can be located on a desktop computer or a mobile device.

*Note:* Present screen is for SAS Mobile BI only. When you leave the app, the presentation automatically pauses.

**Start Your Presentation**

Complete these steps in the report viewer:

1. Tap …
2. Tap **Present Screen**.
3. The email app opens and the invitation appears.

   **Tip** If you do not have an email account, you can share the link in the invitation by using AirDrop.

4. Tap the **To** field and enter the email address for each participant.
5. (Optional) Tap the message area to enter text.
   *Note:* Do not remove the instructions for joining the presentation.
6. Tap **Send**.
7. Tap **Start** to start the presentation.
8. A message appears. It reminds you that all of the participants can see your screen when the presentation starts.
   *Tap** **Continue**.
   *The options bar turns blue and the report title changes to “Presenting.”
   *Note:* If you tap **Cancel**, the presentation is canceled.
**TIP** You can start the presentation before the participants join. Be aware that whenever they do join, they will see your screen as long as you are in the SAS Mobile BI app. If you leave the app or turn off your device, the presentation is automatically paused.

## Invite More Participants
You can add more participants by sending another invitation.

1. Tap ...
2. Tap View Participants.
3. Tap Add Participant.
4. The email app opens and the invitation appears.

**TIP** If you do not have an email account, you can share the link in the invitation by using AirDrop.

5. Tap the To field and enter the email address for each participant.
6. (Optional) Tap the message area to enter text.
   - **Note:** Do not remove the instructions for joining the presentation.
7. Tap Send.

## View the Participant List
To view the list of participants:

1. Tap ...
2. Tap View Participants.
3. Tap Done to dismiss the list.

## Extend Your Presentation
If you do not touch your device for a length of time, the app prepares to automatically disconnect the presentation. A message appears that enables you to extend the presentation:
- Tap **Dismiss** to approve the automatic disconnect.
- Tap **Extend** to continue presenting.
  - **Note:** When you extend the presentation, you disable the automatic disconnect. **You must manually stop the presentation.**

## Stop Your Presentation
Tap **Stop** on the options bar to stop your presentation.
Adjust the Automatic Disconnect Time
This setting indicates how long the app must be idle before the Screen Presentation feature automatically disconnects and stops the presentation.

1 In the Subscriptions view, tap 📊.
2 Tap Advanced Settings.
3 Scroll down and tap Automatically Disconnect.
4 Tap your selection.
5 To return to SAS Mobile BI, tap SAS BI in the upper left corner.

Participating in a Screen Presentation
A screen presentation shows you another person’s device while they are viewing the SAS Mobile BI app. The presentation opens in your web browser. You do not need the SAS Mobile BI app.

Accept an Invitation
You can participate in a screen presentation on any device that runs a web browser.

1 In the invitation email, click or tap the link.
2 When the Sign In to SAS page opens, enter your name in the Name field. This is your screen name in the presentation.
3 Enter your email address in the Email field.
4 Click or tap Join.
   The participant view opens in the web browser.

Leave the Presentation
You can leave the presentation at any time.

1 Click or tap your name in the upper right corner.
2 Click or tap Log out.

Problem: The Link to the Presentation Fails to Open
Issue: You received an email invitation to a screen presentation. When you clicked the link in the email, the link fails to open the web page.

Explanation: You must be on the same network as the screen presenter. If you are at another location that uses a different network, the web viewer security blocks the web page from opening.

Resolution: Identify the network that your device is using. Ask the presenter which network the mobile device is using. One of you must change your selected network to be the same as the other.
Problem: The Screen Appears to Freeze

Issue: During the presentation, there is no activity on the screen.

Explanation: During longer presentations, the screen might freeze.

Resolution: Ask the presenter whether they are actively navigating a report or the app. If the presenter is active, sign out of the web viewer and then sign in again.

Using the Touch Indicator for Presentations

What Is a Touch Indicator?

A touch indicator is a small circle that indicates where your finger is touching the screen. When your device is connected to a display device, either by cable or wirelessly, you can use the touch indicator setting. The touch indicator enables your audience and yourself to see what you are touching on the display. When this setting is turned on, SAS® Mobile BI can display the touch indicator.

By default, this setting is turned on.

Turn On the Touch Indicator

To turn on the touch indicator:

1. In the Subscriptions view, tap 📖
2. Tap Advanced Settings.
3. Tap the Touch Indicators switch.
   - It changes to green.
4. To return to SAS Mobile BI, tap SAS BI in the upper left corner.

Turn Off the Touch Indicator

To turn off the touch indicator:

1. In the Subscriptions view, tap 📖
2. Tap Advanced Settings.
3. Tap the Touch Indicators switch.
   - It changes to white.
4. To return to SAS Mobile BI, tap SAS BI in the upper left corner.
Annotating a Report Page

What Is Annotation?
When you select the Annotate feature, the app creates a screen capture of the current page that you are viewing in the report. You can draw and write your observations on the image. When you are finished, you can share the annotated page with others.

Annotate a Report Page
To annotate a copy of a report page:
1. Tap ...  
2. Tap Annotate.
   An image of the page that you are viewing appears.

   The following tools are available:
   - Tap the pen to write or draw on the image. You can change the color and width of the output. This is the default tool.
   - Tap the highlighter to draw translucent color on the image. You can change the color and width of the output.
   - Tap the eraser to erase parts of the annotation.
     Tap Clear All to clear all of the annotation. You can also change the size of the eraser.
   - Tap the Undo button for each action that you want to undo.
   - Tap the Redo button for each action that you want to redo.

Share the Annotated Page
You can share the annotated page in the following ways:
- Share an image of the annotated page using email or text messages.
- Copy an image of the annotated page to your device clipboard and paste the image into another app.
- Save an image of the annotated page on your device.

Save the Annotated Page
Save your annotated page before you exit the Annotate Page window. If you do not save, your annotated page is discarded.
1. Tap ...  
2. Tap Save Image.
   The image of your annotated page is saved to the Photos app.
Exit the Annotate Window

To exit the Annotate window:

1 Tap Done.

2 Tap Discard in the Discard Annotation message.

Note: If you have not saved the annotated page, it is discarded. To save, tap Cancel to return to the window. Then, see “Save the Annotated Page”.

Copy the Annotated Page

You can copy an image of your annotated page to your device clipboard, and then paste the copy into an app that accepts images.

1 Tap .

2 Tap Copy.

3 Open another app that can accept images.

4 In the applicable location in the other app, press your finger on the screen and then release. An action palette appears.

5 Tap Paste.

The image of the annotated page appears in the other app.

Printing Reports

Print a Report While Viewing It

TIP You must use an AirPrint-enabled printer.

To print a report:

1 Tap .

2 Tap .

3 Tap Print.

A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

TIP To cancel the process, tap Cancel on the progress indicator.

4 In the Printer Options menu, tap Select Printer.

5 Tap the printer to use. It must be an AirPrint-enabled printer.
68

6  Tap Print.

Print a Report from Add Reports

**TIP** You must use an AirPrint-enabled printer.

You can print reports with or without a subscription:

1  Tap the report.

2  Tap ↑.

3  Tap Print.

A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

**TIP** To cancel the process, tap Cancel on the progress indicator.

4  In the Printer Options menu, tap Select Printer.

5  Tap the printer to use. It must be an AirPrint-enabled printer.

6  Tap Print.

You can also print multiple reports at one time. See “Selecting Multiple Reports”.

Print a Report from Search Results

**TIP** You must use an AirPrint-enabled printer.

You can print reports with or without a subscription:

1  Press and hold on the report tile.

2  Tap ↑.

3  Tap Print.

A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

**TIP** To cancel the process, tap Cancel on the progress indicator.

4  In the Printer Options menu, tap Select Printer.

5  Tap the printer to use. It must be an AirPrint-enabled printer.

6  Tap Print.

You can also print multiple reports at one time. See “Selecting Multiple Reports”.
Print a Report While in Subscriptions, Recent, Favorites, or Collection Views

**TIP** You must use an AirPrint-enabled printer.

You can print reports with or without a subscription:

1. Press and hold on the report tile.
2. Tap 
3. Tap Print.

A progress indicator appears. The server connection generates a PDF of the report, and the PDF is downloaded to your device.

**TIP** To cancel the process, tap Cancel on the progress indicator.

4. In the Printer Options menu, tap Select Printer.
5. Tap the printer to use. It must be an AirPrint-enabled printer.
6. Tap Print.

You can also print multiple reports at one time. See “Selecting Multiple Reports”.

Commenting about Reports

The app provides a way to share comments with co-workers who use SAS Mobile BI or SAS Visual Analytics.

**How Can I Comment?**

You can attach comments to the following:

- a report as a whole
- a report object in a report

On tablets, you can open the Comments view and still view a report. You can navigate through a report and its report objects while you are in Comments view.

- When you tap an object, the Comments view displays any comments attached to that object.
- To view or add comments attached to the report as a whole, navigate to the top level of the Comments view.

On phones, the Comments view overlays the report.

- You must tap the object before you open the Comments view.
- To view or add comments attached to the report as a whole, navigate to the top level of the Comments view.

**Navigate and View Comments**

Complete these steps in the report viewer:
1 Tap 1 to open the Information view.

2 To view all available topics, make sure the Information view is for the report as a whole.

   TIP If < appears in the upper left corner of the Information view, you are viewing report object information. Tap < to view information about the report as a whole.

3 Tap Comments.
   Any available topics are displayed in sections:
   ■ The section labeled with the report name contains topics for the report as a whole.
   ■ Sections labeled by a report object name contain topics for that report object.

   TIP You might have to scroll down to view all of the sections.

4 Tap the topic that you want to read. The comments in the topic appear.

5 Tap < to return to the list of all available topics.

Add Comments

   Note: You cannot change the report or object to which the comment is attached after you start the comment. For example, if you start a comment for one report object, and then tap another report object, the comment is discarded and the Information view displays the details for the selected object.

   Complete these steps in the Comments view:

1 To start a new topic:
   a Tap + at the bottom of the view.
   b Enter a topic title in the Add a new topic field.

2 To add a comment to an existing topic:
   a Tap that topic.
   b Tap +.

3 Enter a comment in the message field.

4 (Optional) Add an attachment to the comment.

5 To post the comment, tap Post.

Add an Attachment to a Comment

   Complete these steps in the comment:

1 Tap 📚.

2 Tap the source of the attachment.

3 Select an existing attachment or create a new attachment.
4 If you are not satisfied with the attachment, you can delete it before you post the comment. In the comment, press and hold your finger on the attachment. A menu appears. Tap **Delete**.

**Refresh Comments**

To refresh the comments for a report, drag your finger down on the list of available topics.
Problem: A Report Tile Does Not Display an Image

Problem: When you are in the Subscriptions, Recent, Favorites, or collections views, or in search results, one or more report tiles do not display an image.

Explanation: When possible, an image from the report is auto-generated for the report tile. If an image cannot be generated, the report tile displays a default image.

Resolution: The report tile is working as designed.
Problem: A Page Tile Does Not Display an Image

Problem: When you view the table of contents for a report, one or more page tiles do not display an image.

Explanation: Some types of report objects do not provide an image for a page tile. For example, tables, crosstabs, and gauges do not provide images.

Resolution: The page tile is working as designed.

Problem: Cannot Subscribe to a Report

Problem: You attempt to add a report to your subscriptions, but it fails.

Explanation: The ability to subscribe to reports and view reports is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is ACCESS_MOBILE_BI.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is VIEW_REPORT.

For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: The Favorite View is Empty

Problem: You added one or more reports to Favorites, but the Favorites view is empty.

Explanation: The ability to view reports for a particular server in the Favorites view (and in the Favorites folder in the Add Reports view), is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is VIEW_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.

For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: Cannot Add a Report to Favorites

Problem: You can view a report, but you cannot add the report to favorites.

Explanation 1: You are accessing the report using a guest connection to the server.

In this situation, the Favorites setting is not enabled or only the SAS administrator can add and remove reports from Favorites. See “What Is a Guest Connection?”

Resolution 1: Contact the system administrator for the affected server.
Explanation 2: The ability to add a report to the Favorites view is controlled by a capability assignment.
Resolution 2: Contact the SAS administrator for the affected server.
- (SAS Visual Analytics 8.1 or later) The required capability is MANAGE_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.
For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: Cannot Remove a Report from Favorites

Problem: You cannot remove a report from Favorites.
Explanation 1: You are accessing the report using a guest connection to the server.
In this situation, the Favorites setting is not enabled or only the SAS administrator can add and remove reports from Favorites. See “What Is a Guest Connection?”
Resolution 1: Contact the SAS administrator for the affected server.
Explanation 2: The ability to remove a report from the Favorites view is controlled by a capability assignment.
Resolution 2: Contact the SAS administrator for the affected server.
- (SAS Visual Analytics 8.1 or later) The required capability is MANAGE_FAVORITES.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is PERSONALIZATION.
For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: You Do Not Know the Report Location

Problem: You do not know the server name or the path in which the report is located.
Resolution: The following slideshow shows you how to find a report’s server and path information.
View the slideshow in SAS Help Center.
For detailed steps, see “Identify an Open Report’s Server and Path Information” and “Identify a Closed Report’s Server and Path Information”.

Problem: The Recent View Is Empty

Problem: You have viewed reports, but the Recent view is empty.
Explanation: The Recent view can be empty because of the following reasons:
- You downloaded and viewed the report using a guest connection to the server. Reports viewed using a guest connection are not included in the history of recently viewed reports.
- You cleared the recently viewed reports history for the connection.
- The server on which the affected reports are located might have reset your history.
- The ability to view the content of the Recent view is controlled by a capability assignment.
Resolution: Contact the SAS administrator for the affected server. If the issue is a missing capability, the administrator uses one of the following capabilities:
Problem: Cannot Email or Share Reports

Problem: You cannot email, text message, or share reports in any way.
Explanation: The ability to share a report is controlled by a capability assignment.
Resolution: Contact the SAS administrator for the affected server. The required capability is EMAIL.
For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: Report Data Is Missing or Incomplete

Problem: The report either partially opens or the app displays the following message:
A server data request was not fulfilled. The report object data might be missing or incomplete. Make sure that a network connection is available such as a cellular, Wi-Fi, or other network.
Explanation: This problem occurs when the device is not connected to a network. The report uses data conditions that force the SAS Mobile BI app to retain a live connection with the report server. This connection enables the app to download additional data in response to interactions. This live connection is lost when the device is not connected to a network.
Resolution:
- Make sure that the Airplane Mode setting is turned off. This setting is located in the iOS Settings app.
- Make sure that you currently have a wireless, cellular, or other network connection.

Problem: Report is Missing Web Content

Problem: You see a blank space in a report where web content should appear.
Explanation: Report designers can include a link to web content (such as an external page or YouTube video) in a report. The content to which the link points appears in the report.
The content might be missing because of the following reasons:
- there is no internet connection.
- there was an error in how the link was added to the report.
- the link might no longer be valid.
Resolution:
- Make sure that you currently have a Wi-Fi or other internet connection.
- Contact the report designer.
Problem: Cannot Delete Reports in Subscriptions

Problem: You cannot delete a report in Subscriptions.

Explanation: Some of the reports in Subscriptions are part of a collection that you have auto-subscribed. You cannot delete auto-subscribed reports.

Resolution: To remove the reports from the Subscribed section, clear the auto-subscribe option for the affected collection. See “Remove Auto-subscribe”.

Problem: Cannot View Comments

Problem: You cannot view comments associated with a report or its contents.

Explanation: The ability to view comments is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is VIEW_COMMENTS.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is COMMENTS.

For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: Cannot Add Comments

Problem: You cannot add a comment to a report or its contents.

Explanation: The ability to add comments to a report or its contents is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.1 or later) The required capability is ADD_COMMENTS.
- (SAS Visual Analytics 7.3 and 7.4) The required capability is COMMENTS.

For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

Problem: Alerts Do Not Work

Problem: Alerts do not work for a report.

Explanation: The Alerts feature is not supported on servers running SAS Visual Analytics 8.1. It is supported on all other releases.

Resolution: Contact your SAS administrator about the version of SAS Visual Analytics.
**Problem: Cannot Subscribe to Alerts**

Problem: You cannot access the Alerts view in the report viewer and subscribe to alerts.

The ability to subscribe to alerts is controlled by a capability assignment.

Resolution: Contact the SAS administrator for the affected server.

- (SAS Visual Analytics 8.2 or later) The required capability is `SUBSCRIBE_TO_REPORT_ALERTS`.
  
  **Note:** The Alerts feature is not supported by SAS Visual Analytics 8.1.

- (SAS Visual Analytics 7.3 and 7.4) The required capability is `PERSONALIZATION`.

For more information, see “Capabilities That Affect SAS Mobile BI” on page 81.

**Problem: Columns Do Not Sort in a Table**

Problem: You tap a column heading in a table and the column data does not sort.

Explanation: When the column data does not sort, it might be because of one or more factors:

- Some reports might use a type of data that the app cannot dynamically sort.
- Sorting might be disabled for some objects.

Resolution: Contact your report designer about the design of the report.

**Problem: Drive Time and Drive Distance Are Missing on an Esri Map**

Problem: A report includes a report object that is an Esri map. However, the context menu provides only the `Distance` selection. The `Drive time` and `Drive distance` selections are missing.

One or more of the following situations might be the cause:

- Explanation 1: The affected report is located on a server running SAS Visual Analytics 7.4 or earlier. Drive time and drive distance functionality are provided by release 8.1 and later.
  
  Resolution 1: The server must be running SAS Visual Analytics 8.1 or later. Contact your SAS administrator.

- Explanation 2: You require additional Esri capabilities assigned to your user ID.

  Resolution 2: Your user ID in SAS Visual Analytics must be assigned Esri capabilities. Contact your SAS administrator about your capability assignment.

- Explanation 3: The server does not have your Esri credentials.

  Resolution 3: You must enter your Esri credentials for the applicable server connection in SAS Mobile BI.

**Note:** Depending on your organization, Esri credentials and the server connection credentials can differ. Contact your SAS administrator about your Esri credentials.
Problem: Search Fails to Return Results

Problem: The app does not return any search results for a server connection.

Explanation: The device is not connected to a network. The app requires a network connection for search to work.

Resolution: Make sure the device is connected to a network and that Airplane mode is turned off.

Note: If search continues to fail, contact your SAS administrator.

Problem: App Fails to Respond or Displays Unexpected Behavior

Problem: The app does not respond or the app displays unexpected behavior.

Resolution: Stop the app and, in some cases, reinstall the app. Do so in the following order:

1. Stop the SAS Mobile BI app.
   a. Double-click the Home button. The app switcher appears. It displays the apps that are currently running on the device.
   b. Locate the SAS Mobile BI app. You might have to flick left or right to find the app.
   c. Drag the SAS Mobile BI app up on the screen to stop the app.
      Note: Removing the app from the app switcher stops the app. It does not delete the app from your device.
   d. To close the app switcher, click the Home button.
2. Restart the app to determine whether the problem is resolved.
3. If the problem persists, stop the app again using the procedure in step 1.
4. Delete the app.
   CAUTION! Deleting an app also deletes the reports and data from your device. Any server connections, user IDs, and passwords are also deleted.
   a. On the Home screen, locate SAS Mobile BI:
   b. Press and hold the SAS Mobile BI app icon until it begins to jiggle.
   c. Tap on the SAS Mobile BI app icon. Tapping this badge deletes the app from your device.
   d. To stop the icons from jiggling, click the Home button.
5. Download and install the SAS Mobile BI app: Apple iTunes store.
6 Start the app to determine whether the problem is resolved.
7 If the problem persists, contact your technical support staff.
Capabilities That Affect SAS Mobile BI

Access to certain features in SAS Mobile BI is controlled by a set of capabilities that can be set on a per user per server basis. This means, for example, that a user ID might be assigned the capability to add comments on one server, but not on another.

If a user is having trouble accessing a feature in SAS Mobile BI, their user ID might not have the necessary capability.

Capabilities used by SAS Visual Analytics 8.1 or later are more granular than those used by SAS Visual Analytics 7.3 or 7.4. The following table provides information about SAS Mobile BI capabilities and the features they control. If a user is having trouble accessing a feature, verify the capabilities that have been assigned to their user ID for the applicable server. For more information, see the following documentation:

- (Release 8.1 or later) SAS Viya Administration: Mobile
- (Release 7.4) SAS Visual Analytics 7.4: Administration Guide and search on mobile.
- (Release 7.3) SAS Visual Analytics 7.3 documentation page and view the Administration Guide PDF.

Table 9.1  Capabilities Used by SAS Mobile BI

<table>
<thead>
<tr>
<th>Capability</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCESS_MOBILE_BI</td>
<td>Enables a user to subscribe to and view reports.</td>
</tr>
<tr>
<td>ACCESS_RECENTS</td>
<td>Enables a user to see items for a particular server in their Recent view. It also enables the user, in Add Reports, to see the contents of the Recent folder for that server.</td>
</tr>
<tr>
<td>ADD_COMMENTS</td>
<td>Enables a user to add comments to a report or its contents.</td>
</tr>
<tr>
<td>EMAIL</td>
<td>Enables a user to share links to reports (and screen captures) by using email, text messaging, or other functionality.</td>
</tr>
<tr>
<td>Capability</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MANAGE_FAVORITES</td>
<td>Enables a user to add a report to the Favorites view, or remove a report from the Favorites view.</td>
</tr>
<tr>
<td></td>
<td>Note:</td>
</tr>
<tr>
<td></td>
<td>The VIEW_FAVORITES capability takes precedence over this capability. If a user ID is not assigned the capability to view favorites, the user cannot add or remove favorites, even if the user is assigned the MANAGE_FAVORITES capability.</td>
</tr>
<tr>
<td>SUBSCRIBE_TO_REPORT_ALERTS</td>
<td>Enables a user to view alerts in a report and to subscribe to them.</td>
</tr>
<tr>
<td></td>
<td>Note:</td>
</tr>
<tr>
<td></td>
<td>The Alerts feature is not supported on servers running SAS Visual Analytics 8.1.</td>
</tr>
<tr>
<td>VIEW_COMMENTS</td>
<td>Enables a user to view the comments that are associated with a report or its content.</td>
</tr>
<tr>
<td>VIEW_FAVORITES</td>
<td>Enables a user to see items for a particular server in the Favorites view. It also enables the user, in Add Reports, to see the contents of the Favorites folder for that server.</td>
</tr>
</tbody>
</table>

### Password Storage on Devices

SAS Mobile BI accesses servers on which reports are located. Typically, these servers are configured to require a user ID and password before permitting access. The SAS Mobile BI app stores the user ID and password on the mobile device.

The app uses application programming interfaces (APIs) provided by the mobile device’s operating system to store and retrieve this information:

- Android uses the AccountManager API.
- iOS uses the Apple Keychain APIs.
- Windows uses the Microsoft Credentials Locker.
Getting Help

Ways to Get More Help

If you have problems with a report, contact the report designer or your SAS® Visual Analytics administrator.

For more help:
- view the videos about SAS® Mobile BI at SAS Mobile BI Documentation web page.
- see the documentation and videos about SAS Visual Analytics at SAS Visual Analytics web page.
- participate in the SAS Visual Analytics section of the SAS Community web site.
- contact SAS Technical Support.

Give Feedback

If you have feedback about the SAS Mobile BI app, contact SAS.

TIP  This link opens your email app.

If you have feedback about the Help, submit your comments using the feedback form. In the Feedback category list, select Documentation.
Get Information about SAS Products

For more information about SAS® Visual Analytics and SAS Mobile BI:

See the SAS Mobile page at this address:
http://www.sas.com/mobile

Email for information:
mobilebi@sas.com

TIP  This link opens your email app.

View the Video Tutorials on YouTube

SAS® Mobile BI provides video tutorials that show how to use features in the app. These videos are available at SAS Mobile BI for iPad and iPhone playlist on YouTube

TIP
- You must have either Wi-Fi or cellular network access to view the videos.
- The playlist includes videos that are not tutorials. The titles for video tutorials include (Tutorial) in them.
- To view the video in the highest quality resolution, make sure HQ is selected.

User Interface Help Pages

Subscriptions View
Shows all of the reports to which you subscribe on this mobile device.

Common Tasks
View a Report: Tap the report tile.
Add a New Report to Your Subscriptions
"Update a Closed Report"
Add a Report to Favorites

More Tasks
View Your Favorite Reports
Review Your Recent Report Access from All Devices
View Collections of Reports
Email or Text a Report
Unsubscribe from a Report
Print a Report

**TIP** You can print reports with or without a subscription. You must use an AirPrint-enabled printer.

Troubleshooting SAS® Mobile BI

**Add Reports Window**
Shows your server connections and the reports that they contain.

**Common Tasks**
Subscribe to a Report
Add a Server Connection
Locate a Report on a Server Connection
Search Reports

**More Tasks**
View Report Details: Tap the report tile.
Change the Password for a Server Connection
Clear the Recent View
Email or Text a Report
Print a report

**TIP** You can print reports with or without a subscription. You must use an AirPrint-enabled printer.

Troubleshooting SAS® Mobile BI

**Report Viewer**
View your reports. Explore your data. Share your screen.

**Common Tasks**
Use Features Designed into the Report
View Reports and Report Objects
View Information about a Report Object
View a Report Object Using the Full Screen
Update the Report

**More Tasks**
Present Your Screen to Others
Annotate a Page from a Report
“Email or Text a Report”

Print a Report

**TIP** You must use an AirPrint-enabled printer.

“Troubleshooting SAS® Mobile BI”

**Favorites View**

Reports added to your favorites on this or another device. See “Your Favorites on Every Device”.

**Common Tasks**

Subscribe to a Report: Press and hold on the report tile, and then tap **Subscribe**.

View a Report

“Update a Closed Report”

**More Tasks**

Remove a Report from Favorites

“Email or Text a Report”

Print a Report

**TIP** You can print reports with or without a subscription. You must use an AirPrint-enabled printer.

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**Recent View**

Reports that you have recently viewed on this or another device.

**Common Tasks**

Subscribe to a Report: Press and hold on the report tile, and then tap **Subscribe**.

View a Report

“Update a Closed Report”

**More Tasks**

“Clear the Recent View”

Add a Report to Favorites

“Email or Text a Report”

Print a Report

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Collections View
Shows a group of reports that a collection owner has selected and made available to you.

Common Tasks
“Auto-subscribe to a Collection”
View a Report
“Update a Closed Report”

More Tasks
“Remove Auto-subscribe”
Add a Report to Favorites
“Email or Text a Report”
Print a Report

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